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Morocco

Citrus

Citrus Annual - 1998

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Report Highlights:

Next year's fresh citrus output at 1.2 MMT is expected to be lower compared to last year's bumper crop and should result in lower exports.

The Russian crisis is expected to impact negatively on Moroccan fresh citrus exports as Russia imported over 23 percent of Morocco's citrus exports last year.

The Moroccan fruit and vegetable exporting board, AFB, that accounted for over 90 percent of fresh citrus exports last year has been divided into two exporting entities, AFB and FFT.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rabat [MO1], MO

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Executive Summary

Next year's fresh citrus output at 1.2 MMT is expected to be lower compared to last year's bumper level, owing to the alternate bearing but also to inadequate weather conditions that prevailed in the flowering period in some areas.

Exports, forecast at 535,000 MT, are expected to be lower than last year, reflecting the lower crop size this season. Quality of the citrus fruit should be higher this year and result in a higher proportion of fruit being exported.

The Russian crisis is expected to impact heavily on Moroccan fresh citrus exports. Last year, Russia imported about 148,000 MT (or 23 percent of Morocco's total citrus exports) which represents a five fold increase from four years ago. Moroccan exporters are concerned about the potential loss of this market and, like their competitors, they will have to find other outlets in the short term.

The Morocco fruit and vegetables exporting board, AFB, that handled over 90 percent of citrus exports last year broke up into two separate exporting entities: AFB with 6 exporting groups, and FFT with 4 exporting groups. AFB will still handle all the logistics for exports but AFB and FFT will both be exporting citrus fruit.

FRUMAT, Morocco's sole crusher processed some 128,000 MT of fresh citrus last year after the dramatic drop in processing in MY 97. Next year's citrus processing is expected to average 90,000 MT due to the anticipated small crop. FRUMAT received some assistance from the GOM last year to be able to reopen its mills and to process excess fruit in 1997/98.

Production

General

Morocco's citrus production in 1998 is expected to drop to 1.235 MMT, down 22.3 percent compared to last year's bumper crop. The alternate bearing nature of the citrus tree resulted in lower and more heterogeneous flowering, especially in the Souss (vicinity of Taroudent) and Gharb areas (vicinity of Kenitra). Tangerine-like varieties such as Clementine, Nour, and Ortanique and orange varieties such as Maroc-late showed particularly low flowering compared to last year.

Citrus production is expected to be down in all regions. Also, production is expected to be down for all major varieties, especially for Maroc-Late, Clementines and Navel. These three varieties accounted for over 84 percent of Morocco's citrus production last year. The drop in production is attributed to the alternate bearing nature of the citrus trees but also, in the case of Clementines and other small citrus fruit, to the physiological droppings which increased because of hot weather recorded during June and July 1998.

The table below provides data on production forecasts for fresh citrus by variety and region (1000 MT):

Production, Marketing Year 1997 (97/98):

Region*\Variety**	Clementine		Blood Or.		Salutiana		Nour		Total
	Navel		M-Late		Ortanique		Others		
Souss	190	100	11	330	42	36	21	.	730
Moulouya	115	70	0	8	.	1	2	.	196
Center & North	47	130	46	350	15	15	3	.	604
Gharb/Loukkos	23	70	35	220	5	7	.	.	360
Tadla	18	40	10	100	7	5	.	.	180
Haouz	6	20	1	30	3	3	3	.	65
TOTAL	352	300	57	688	57	52	26	60	1,591

Production, Marketing Year 1998 (98/99):

Region\Variety	Clementine		Blood Or.		Salutiana		Nour		Total
	Navel		M-Late		Ortanique		Others		
Souss	185	85	10	240	30	26	25	.	601
Moulouya	100	60	0	6	.	1	1	.	168
Gharb/Loukkos	14	55	26	150	4	5	.	.	254
Tadla	11	35	6	45	5	3	.	.	105
Haouz	4	15	1	24	2	3	1	.	50
TOTAL	313	250	43	465	41	38	27	58	1,235

Percent Increase in 1998 production compared to 1997

Region\Variety	Clementine		Blood Or.		Salutiana		Nour		Total
	Navel		M-Late		Ortanique		Others		
Souss	-2.6	-15.0	-9.1	-27.3	-28.6	-27.8	19.0	Na	-17.7
Moulouya	-13.0	-14.3	-33.3	-25.0	Na	25.0	-50.0	Na	-14.2
Gharb/Loukkos	-39.1	-21.4	-25.4	-31.8	-20.0	-34.3	Na	Na	-29.5
Tadla	-41.7	-12.5	-36.8	-55.0	-25.7	-40.4	Na	Na	-41.7

Haouz	-36.4	-25.0	-30.0	-20.0	-28.0	10.0	-48.9	Na	-23.2
=====									
TOTAL	-11.0	-16.7	-24.3	-32.4	-27.4	-26.9	6.5	-3.3	-22.3
=====									

Source: SASMA

Notes:

- 1) figures may not add to total because of rounding.
- 2) Souss: vicinity of Agadir, Moulouya: vicinity of Berkane & Oujda, Gharb: vicinity of Kenitra, Tadla: vicinity of Beni Mellal, Haouz: vicinity of Marrakech.
- 3) Clementine, Nour, and Ortanique are similar to the Tangerines.

The official GOM figures usually become available one or two years after the crop. Although SASMA estimates are not always accurate, they have been the sole source of fresh citrus production forecasts. SASMA is a private service company that helps individual farmers. It is financed by producer organizations.

The table below provides a production calendar for major citrus fruits available in Morocco:

	Beg.of Season	End of Season
=====		
SMALL CITRUS FRUIT		
Clementines	End of September	- End of January
Hameline	Mid-December	- Mid February
ORANGES		
Navels	November	- Mid April
Maroc-Late	March	- Mid July
Sanguine (deep blood)	Mid-December	- End of March
Salutiana	Mid-November	- End of April
=====		

Source: AGATT

Area

According the citrus producer's association, ASPAM, Morocco should be planting about 34,240 hectares over the next 8 years of citrus crops in order to keep up with the increasing demand in both local and export markets. Nearly half of the area under this program will be devoted to replacing aging citrus orchards. This ASPAM program requires that 4,274 hectares be planted each year. Such a program is too optimistic in comparison to the effective increase in citrus areas during the past years that was about 1,000 hectares per year. Most of the recent increase in citrus area was for Maroc-Late and small off-season varieties of citrus such as Nour and Ortanique to avoid competing against the heavy export periods for Clementines.

One interesting aspect about the ASPAM proposed program is that it shows that the biggest concern is for the Clementines and Navels for which there is currently no significant increase in area. The problems encountered

with selling Clementines and Navels, especially in the export market, are the main reason for this slowdown. Also, the Gharb area where the citrus was originally produced in Morocco, shows a steady decline in citrus production owing to aging orchards.

The ASPAM program is not likely to be fully realized unless the GOM announces more specific and appealing incentives to plant citrus trees. Currently, as an incentive to establish new orchards, farmers are provided with a 3,000 dirhams per hectare (\$322) bonus in the form of citrus seedlings (see policy section).

Processed Citrus

After it reached its lowest level in 10 years during 1996/97, citrus processing went up sharply in 1997/98 as a result of the bumper citrus crop. The low quality of fruit during 1997/98 resulted in more fruit being discarded from export and channeled to the local fresh fruit market. As a result, prices for fresh citrus went down significantly and forced many farmers to deliver their crops to FRUMAT. The large fruit supply in the local market encouraged FRUMAT to reopen the citrus crushing mills it closed one year earlier because of a shortage of fruit.

Regarding the 1998/99 season, and as a result of the lower anticipated crop, citrus crushing is forecast to decrease about 30 percent, but should still be close to the five-year average level. The table below provides data on citrus processing by FRUMAT (Metric Tons):

Marketing Year	96/97	97/98 Rev.	98/99 Forc.	Average 93/94-97/98
ORANGES	(6,127)	(118,000)	(83,000)	(85,021)
Maroc Late	5,124	95,000	67,000	65,432
Navels	19	3,000	2,000	7,311
Other Oranges	984	20,000	14,000	12,278
CLEMENTINES	.	10,000	7,000	10,822
Pomelo	.	.	.	466
Lemon	.	.	.	53
Total Received:	6,127	128,000	90,000	89,337

Source: FRUMAT.

Maintaining a regular supply of citrus fruit remains the major problem facing FRUMAT. The yearly fluctuation of the local citrus production combined with the lack of adequate contractual arrangements with local farmers to regularly supply fruit, make it difficult for FRUMAT to carry on any medium or long-term development program. The problem is exacerbated by the trend in declining world concentrate prices caused by stiffer competition including from Florida.

FRUMAT is currently restructuring itself to reduce overheads. Some of its loans have been rescheduled while others are about to be consolidated. Packing houses entered into an agreement with FRUMAT to supply it with a minimum quantity of fruit. FRUMAT will have to pay higher prices for the citrus fruit and probably use the funds collected from the producers association and from the GOM for this purpose (see policy section).

Consumption

Exports absorb the best quality fruit because it usually provides a higher return to producers than selling it in the local market. Processing is considered the least desirable outlet as it provides the lowest return to producers.

When in season, citrus fruits are readily available to consumers and most people can afford them. In 1997/98, the bumper crop resulted in significantly lower prices for fresh citrus in the local market compared to the year before. This was particularly true for Maroc-late oranges that were sold at 400 dirhams/MT (\$43, ex- packing house price) in the Gharb and Tadla and even at 200 dirhams/MT (\$21.5) in some cases in the Souss area. The low quality of the oranges (Maroc Late) resulted in large quantities being channeled to local markets, rather than being exported. As a result, FRUMAT had no choice but to open its crushing mills to avoid further drops in fresh citrus prices and to absorb the excess of production. This was made possible with some assistance from the GOM (see policy section).

The table below provides prices paid to farmers who deliver their fruit to FRUMAT. The increase in world concentrate prices encouraged FRUMAT to pay higher prices to farmers.

	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98
Exch.Rate (dirhams/\$US)	8.538	9.258	9.258	8.5128	8.6483	9.4334
ORANGES						
- Maroc-Late	\$70.27	\$64.81	\$86.41	\$35.24	\$23.13	\$34.98
- Navels	\$40.99	\$54.01	\$64.81	\$29.37	\$23.13	\$28.73
- Early Varieties	\$70.27	\$54.01	\$64.81	\$29.37	\$23.13	\$40.60
- Clementine	\$29.28	\$27.00	\$42.45	\$22.91	\$23.13	\$23.96

Source: FRUMAT

The table below provides data on FRUMAT citrus juice sales to the local market. Sales to consumers have been converted to a concentrate (65 brix) basis.

	95/96	96/97	97/98	98/99 Forc.
Total Local Sales (MT)	2,195.1	1,283.8	536.9	1,290.0
To Industrials (65 Brix)	1,820.0	1,023.0	289.0	1,000.0

To Consumers (65Brix) or in as is basis	375.1	260.8	247.9	290.0
+ Single Strength (11 Brix)	830.0	590.0	543.0	600.0
+ Other Drinks (35% juice)	3,970.0	2,724.0	2,640.0	3,200.0

Source: FRUMAT, AGATT

The largest consumer of citrus concentrate in Morocco is the soft drink industry which consumes about 1,000 MT per year. In 1997/98, the drop of FRUMAT sales to local industrials is due primarily to low stocks and low price competitiveness. As a result, Morocco imported about 870 MT of citrus concentrate during the first nine months of MY 98 from Brazil.

Trade

Fresh citrus exports totaled an estimated 610,000 MT for the whole of 97/98. This represents a significant increase from last year but it is lower than what was anticipated due to the lower fruit quality and the generally smaller crop size last year.

Morocco's fresh citrus exports continue to be overwhelmingly directed to the E.U. market. Proximity to the EU, high prices in the EU market, and more importantly the preferential duties to which Moroccan citrus are subjected to when entering the EU will continue to make the EU market appealing to Moroccan fresh citrus exporters. The share of citrus exported to the EU last year dropped by over 10 percent as more citrus was directed to the Russian market. The lower quality of citrus last year led Morocco to direct a larger share of its exports to Russia. Russia has generally been importing lower quality oranges that are less suitable for the Western European Market. Exports to this country increased nearly three fold in 1997/98 to reach 148,088 MT.

For the 1998/99, total fresh citrus exports are forecast to be down, reflecting the lower crop this year. First estimates place total exports at 535,000 MT which is down about 70,000 MT compared to last year. Most of the drop in exports is due to the anticipated smaller quantity of Maroc-Late oranges available for export. Reportedly, the quality of the fruit is considerably better this year compared to last year and should result in a higher proportion of fruit being exported.

Percent Increase in export MY 98 vs MY 97

		Clementine		Bl.Orang.	Salutiana		Nour		Total	
		Navel			M-Late	Ortanique		Others		
SOUSS	18.6	8.2	-14.4	-15.7	-23.1	-23.6	18.2	na	-5.1	
MOULOUYA		-10.7	67.6	-14.5	9.8	NA	42.0	-46.0	na	-7.3
GHARB/LOUKKOS			-5.0	54.5	-21.9	-15.1	-8.0	-23.6	-9.1	na -10.4
TADLA		-33.7	-11.7	-34.0	-54.8	-29.2	-45.5	-60.4	na	-40.3
HAOUZ	-40.2	-32.6	-16.8	-33.8	-27.0	23.0	-47.7	na	-30.8	
Overall		1.3	7.0	-22.2	-23.7	-23.0	-22.6	5.8	16.7	-12.3

Overall Export (1,000 MT):

Exp. MY 97	156	65	32	262	34	34	15	12	610
Exp MY 98 (Forc.)	158	70	25	200	26	26	16	14	535

Source: EACCE

Note: Figures may differ from other tables and from PS&D because from different source.

Impact of the Russian Crisis

The Russian crisis is a major concern to Moroccan citrus exporters. The Russian market for Moroccan citrus grew from 30,584 MT in 1994/95 to 148,088 MT last year. This number represented 23.8 percent of total Morocco citrus exports in 97/98 (9 months). Eastern European countries, especially Russia, have been a valuable outlet for Moroccan citrus exporters because of the increasing difficulties encountered when exporting to the EU.

The Russian crisis means not only a smaller pie for all citrus exporting countries but also stiffer competition in third markets since these countries will try to find other outlets for their products. Currently, unless there are obvious guarantees that payment will be received, Moroccan exporters will be reluctant to ship citrus to Russia.

Morocco-EU agreement

The free trade agreement signed with the EU in February 1996 has not yet been ratified by Italy and Belgium. Basically, Moroccan citrus fruit will enter the EU under the same conditions as last year except that the Minimum Entry Prices be lowered according to the schedule reported last year (see MO7014).

Trade Matrix

Morocco's Fresh Citrus Exports by Type

Marketing Year	94/95	95/96	96/97	97/98 (9 months)
Oranges & Similar	240,081	378,688	264,094	386,823
Clementines & Similar	142,390	186,560	191,603	173,864
Lemon	254	465	78	920
Grapefruit	21	329	28	22
Total	382,746	566,042	455,803	561,629

Source: Moroccan Official Trade Data (Office des Changes)

The tables below provide data on Morocco's oranges and clementine-like fruit by destination.

Fresh Citrus Export: Oranges

Marketing Year	10/96-9/97			10/97-6/98 (9 months)		
	MT	(\$1000)	% of Total	MT	(\$1000)	% of Total
Exchange Rates (dh/\$)	9.5540			9.8000		
TOTAL EU	211,555	83,454	79.9%	237,364	86,064	62.1%
-France	75,546	30,259	29.0%	78,722	28,093	20.3%
-Germany	36,296	14,817	14.2%	39,470	15,881	11.5%
-Great Britain	40,444	15,610	15.0%	38,105	13,912	10.0%
-Belgium	18,426	7,157	6.9%	26,683	9,592	6.9%
-Netherlands	22,505	8,158	7.8%	29,348	9,550	6.9%
-Sweden	9,766	3,801	3.6%	11,591	4,256	3.1%
-Finland	7,086	3,130	3.0%	9,547	3,773	2.7%
-Portugal	868	318	0.3%	1,988	641	0.5%
-Spain	617	204	0.2%	1,886	355	0.3%
-Austria	0	0	0.0%	23	12	0.0%
Russia	35,900	14,039	13.4%	120,387	41,636	30.1%
Lithuania	3,941	1,473	1.4%	18,041	6,069	4.4%
Norway	2,718	1,056	1.0%	3,966	1,437	1.0%
Saudi Arabia	1,489	939	0.9%	2,005	1,308	0.9%
Canada	99	57	0.1%	2,055	797	0.6%
U.A.E.	730	461	0.4%	684	455	0.3%
Others	7,661	2,915	2.8%	2,322	758	0.5%
	264,094	104,394	100.0%	386,823	138,523	100.0%

Source: Official Moroccan Trade Data (Office des Changes)

Moroccan Fresh Citrus Export (Tangerine like citrus)

Marketing Year	10/96-9/97			10/97-6/98 (9 months)		
	MT	(\$1000)	% of Total	MT	(\$1000)	% of Total
Exchange Rates (dh/\$)		9.5540			9.8000	
TOTAL EU	122,402	72,608	63.9%	102,029	60,486	58.7%
-France	65,033	38,568	34.0%	44,738	27,231	26.4%
-Germany	27,320	16,196	14.3%	21,928	12,716	12.3%
-Sweden	9,707	5,684	5.0%	11,446	7,000	6.8%
-Great Britain	5,478	3,309	2.9%	7,574	4,483	4.4%

-Netherlands	3,434	1,922	1.7%	6,912	3,701	3.6%
-Finland	7,002	4,150	3.7%	5,132	2,931	2.8%
-Belgium	3,685	2,368	2.1%	3,988	2,366	2.3%
-Spain	317	81	0.1%	269	30	0.0%
-Austria	426	330	0.3%	42	28	0.0%
Russia	13,225	7,843	6.9%	27,701	16,014	15.5%
Canada	23,857	13,441	11.8%	14,664	8,671	8.4%
Norway	11,186	6,687	5.9%	12,264	7,457	7.2%
Saudi Arabia	5,567	3,631	3.2%	5,537	3,971	3.9%
Poland	10,736	6,580	5.8%	6,656	3,921	3.8%
Lithuania	3,077	1,907	1.7%	4,199	2,031	2.0%
Others Destin.	1,553	851	0.7%	813	448	0.4%
=====						
Total	191,603	113,549	100.0%	173,864	102,998	100.0%
=====						

Source: Official Moroccan Trade Data

Division inside Atlas Fruit Board (AFB)

AFB was created by a group of 10 large producers and exporters of citrus after the abolition of the Export Monopoly (OCE) over ten years ago. It has since then been responsible for managing the logistics of exports of citrus and vegetables and also responsible for supplying fruit to the contract markets (Canada, Middle East countries, Scandinavian countries and more recently Russia). Last year, AFB handled over 90 percent of Morocco's fresh citrus exports. Also, AFB has been responsible for promotion activities in contract markets such as Scandinavian countries and Russia.

Over the last year, four members of AFB decided to form their own exporting group, Fresh Fruit Trade. An understanding was reached recently between all large exporting groups to maintain the AFB role in managing the logistics, but exports and promotion in contract countries are expected to be done by each group separately.

The rifts in AFB reflect the divergence of interests between various citrus exporting groups and indicates that some exporters no longer agree with the AFB export and promotion policies in the contract markets, including Russia.

Stocks

As a result of last year's good crushing season for FRUMAT, citrus concentrate stocks are believed to have replenished after they reached their lowest level in years. The financial difficulties of FRUMAT will prevent it from holding large stocks in the future unless the world prices fall considerably.

Policy

The GOM plans to abolish the 3,000 dh/hectare bonus provided to citrus farmers in the form of free seedlings

and to replace it by a cash bonus of 7,800 dh/ha provided to farmers who plant new citrus orchards. Also, as for other farmers, citrus growers will receive a 2,000 dh/ha bonus if they invest in drip irrigation equipment. This new incentive will not go into effect until the GOM announces it officially.

The GOM decided to support restoring the financial solvency of FRUMAT by granting it about \$3.2 million per year for the next three years. The producer's organizations (also shareholders of FRUMAT) committed to match funds in order to allow FRUMAT to become reestablished. FRUMAT has been playing a key role in absorbing the excess of production and avoiding falls in local citrus prices.

Marketing

Citrus marketing is done entirely by the private sector and the GOM's role consists basically of quality control in exports. Citrus fruit is normally directed to the nearby packing house where it is processed for export. Fruit unsuitable for export is sold in the local fresh market or eventually to FRUMAT for processing.

There are virtually no market development activities undertaken in Morocco and to our knowledge none is planned for the near future.

In export markets, some Moroccan citrus exporting groups have their own promotional campaigns in countries of destination. In addition, the AFB, up to last year, had been responsible for promoting Moroccan citrus in contract markets. This was done through trade missions and participation in trade shows particularly in Scandinavian and Eastern European countries. Today, with the recent divisions within AFB, it is not clear how each exporting group is going to promote its products in the contract markets.

Consumption of citrus juice increased considerably during the past few years as indicated by the increasing number of citrus juice brands in the local market. FRUMAT has not been consistently in the market and has failed to supply regular quality citrus juice to consumers.

Also, consumption of concentrate juice by the local soft drink industry has been steadily increasing and imports of concentrate have been more frequent than in the past due to the irregular supply of concentrate by FRUMAT, but also due to its low price competitiveness. In many cases, the major end-user of citrus concentrate in Morocco does not import the products, but receives what is procured by the controlling office abroad, which combines its concentrate purchases worldwide.

End of text.

PSD Table						
Country:	Morocco					
Commodity:	Oranges					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		10/1996		10/1997		10/1998
Area Planted	48	48	48	48	0	48
Area Harvested	47	47	47	47	0	47
Bearing Trees	15552	15552	15700	15700	0	15700
Non-Bearing Trees	150	150	150	150	0	150
TOTAL No. Of Trees	15702	15702	15850	15850	0	15850
Production	774	774	1120	1131	0	810
Imports	0	0	0	0	0	0
TOTAL SUPPLY	774	774	1120	1131	0	810
Exports	261	264	470	405	0	330
Fresh Dom. Consumption	507	504	500	608	0	397
Processing	6	6	150	118	0	83
TOTAL DISTRIBUTION	774	774	1120	1131	0	810

PSD Table						
Country:	Morocco					
Commodity:	Fresh Tangerines					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		10/1996		10/1997		10/1998
Area Planted	20	20	21	21	0	21
Area Harvested	19	19	20	20	0	20
Bearing Trees	6641	6641	6700	6700	0	6700
Non-Bearing Trees	150	150	150	150	0	150
TOTAL No. Of Trees	6791	6791	6850	6850	0	6850
Production	384	384	420	430	0	390
Imports	0	0	0	0	0	0
TOTAL SUPPLY	384	384	420	430	0	390
Exports	190	192	230	205	0	200
Fresh Dom. Consumption	194	192	190	215	0	183
Processing	0	0	0	10	0	7
TOTAL DISTRIBUTION	384	384	420	430	0	390

PSD Table						
Country:	Morocco					
Commodity:	Fresh Citrus,Other					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		10/1996		10/1997		10/1998
Area Planted	5	5	5	5	0	5
Area Harvested	4	4	5	5	0	5
Bearing Trees	1200	1200	1200	1200	0	1200
Non-Bearing Trees	0	14	0	15	0	15
TOTAL No. Of Trees	1200	1214	1200	1215	0	1215
Production	14	14	10	10	0	15
Imports	0	0	0	0	0	0
TOTAL SUPPLY	14	14	10	10	0	15
Exports	0	0	0	0	0	5
Fresh Dom. Consumption	14	14	10	10	0	10
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	14	14	10	10	0	15

PSD Table						
Country:	Morocco					
Commodity:	Fresh Lemons					
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin		10/1996		10/1997		10/1998
Area Planted	1	1	1	1	0	1
Area Harvested	1	1	1	1	0	1
Bearing Trees	280	280	280	280	0	280
Non-Bearing Trees	10	10	10	10	0	10
TOTAL No. Of Trees	290	290	290	290	0	290
Production	22	22	20	20	0	20
Imports	0	0	0	0	0	0
TOTAL SUPPLY	22	22	20	20	0	20
Exports	0	0	0	0	0	0
Fresh Dom. Consumption	22	22	20	20	0	20
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	22	22	20	20	0	20

PSD Table						
Country:				65	Degrees Brix	
Commodity:						
		1996		1997		1998
	Old	New	Old	New	Old	New
Market Year Begin						
Deliv. To Processors	6	6	150	118	0	83
Beginning Stocks	4856	4856	2830	3232	7830	10395
Production	568	568	15900	12700	0	9500
Imports	0	1952	0	1000	0	600
TOTAL SUPPLY	5424	7376	18730	16932	7830	20495
Exports	1310	2860	8500	6000	0	8000
Domestic Consumption	1284	1284	2400	537	0	1290
Ending Stocks	2830	3232	7830	10395	7830	11205
TOTAL DISTRIBUTION	5424	7376	18730	16932	7830	20495

Export Trade Matrix			
Country:		Units:	MT
Commodity:			
Time period:	MY96/MY97 (9months)		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Russia	35900		120387
France	75546		78722
Germany	36296		39470
Great Britain	40444		38105
Belgium	18426		26683
Netherlands	22505		29348
Lithuania	3941		18041
Sweden	9766		11591
Finland	7086		9547
Norway	2718		3966
Total for Others	252628		375860
Others not listed	11466		10963
Grand Total	264094		386823

Export Trade Matrix			
Country:		Units:	MT
Commodity:			
Time period:	MY96 / MY 97 (9months)		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
France	65033		44738
Germany	27320		21928
Russia	13225		27701
Canada	23857		14664
Norway	11186		12264
Saudi Arabia	9707		5537
Finland	7002		5132
Great Britain	5478		7574
Poland	10736		6656
Lithuania	3077		4199
Total for Others	176621		150393
Others not listed	14982		23471
Grand Total	191603		173864